

North Florida DORA



ETA Projects

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- Practitioner PIN Pilot Survey
- e-file Customer Number Pilot Survey
- Alternative Payment Methods Survey

Practitioner PIN Pilot Survey

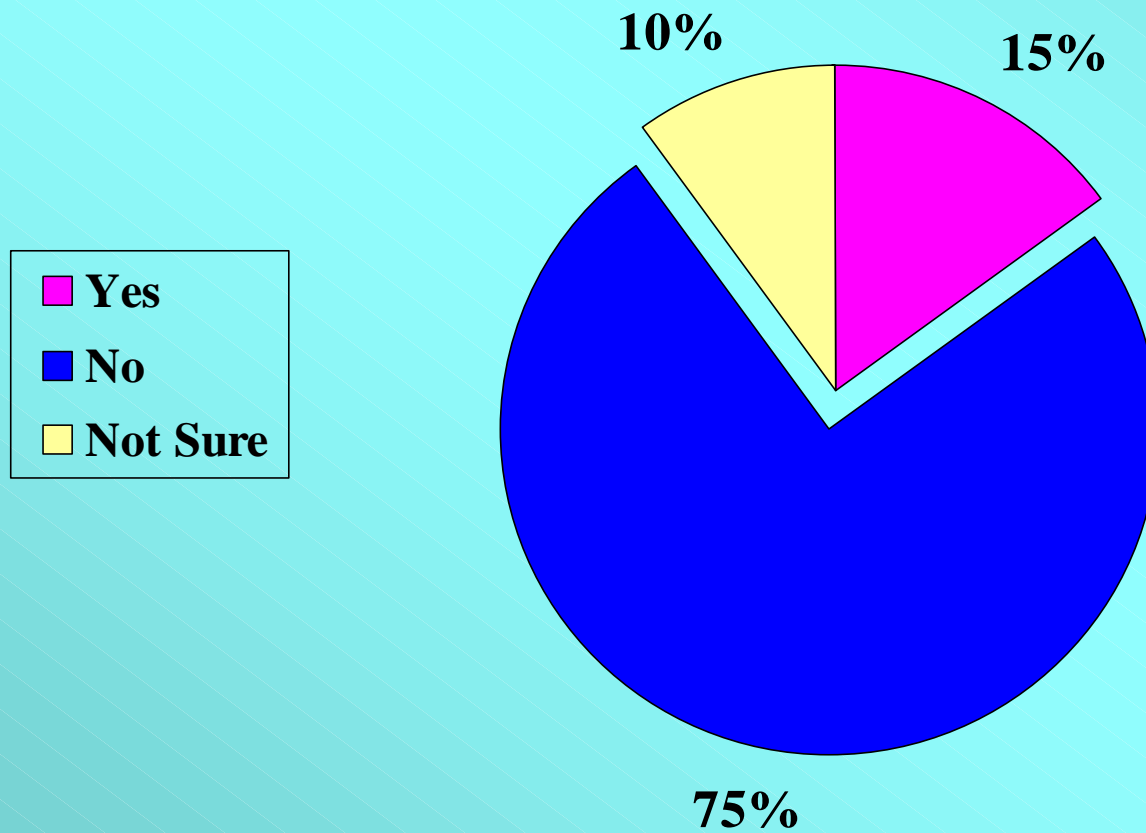
- Survey practitioners about their PIN experience and perception of their clients' experience
- 500,000 returns filed using PIN
- Survey mailed 04/22/99 and draft report submitted 06/16/99

Practitioner PIN Pilot Survey

Key Findings

- Overall Reaction Positive
 - Most want to see this program permanent
 - Process easy to incorporate
- Multiple Benefits Perceived
 - Burden Reduction
 - Preferable to Form 8453
 - Increases Productivity

Did PINs Increase e-file Returns?



Practitioner PIN Pilot Survey

Key Findings (continued)

- Pilot did not bring in new e-file returns
- PINs present logistical barrier
 - TP actually inputting PIN into computer
 - TP(s) returning to practitioner office

Practitioner PIN Pilot Survey

Key Findings (continued)

- Problems Cited
 - Receiving information that could participate
 - Lack of Information about PIN Pilot
 - Difficulty explaining to clients
 - Forms still not acceptable
 - Confusion regarding filing requirements

Practitioner PIN Pilot Survey

Recommendations:

- Continue PIN Program
 - Reduces practitioner and IRS burden
- Establish direct communication between IRS and program participants
- Develop concise marketing leaflet describing program to practitioners
- Develop abbreviated marketing tool that practitioners can utilize with clients

Practitioner PIN Pilot Survey

Recommendations(continued):

- Work with external stakeholders to develop a signature alternative that bridges the Taxpayer-Practitioner Physical Gap
- Allow Form 8379 Injured Spouse Claim and Allocation to be filed electronically
- Consolidate the two PIN paper pages to one page

On-Line e-file Customer Number (ECN) Survey

- 8 million taxpayers from Tax Year 1997 selected to receive ECNs
- 8 percent usage (651,000)
- Survey TPs about their experience
- Survey approved by OMB
- Survey expected to be mailed by July 16th
- Draft Report in late September

Alternative Payment Methods

- Payments using credit card and direct debit
- Approximately 115,000 TPs made \$300 million in payments
- Questions included with On-Line ECN survey
- Survey practitioners in September
- Draft Report by 10/30/99